

WHAT IS CLAIMED IS:

- 5 1. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:
- 5 a user interface and controller having a plurality of programming functionalities;
- the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;
- 10 the user interface and controller communicating with the data base whereby the data base supplies first and second data stored in the data base to the user interface and controller, the first data being provided to the user interface and controller for providing a format for the requests to the user and the second data being provided to the user interface and controller for preparing text in the document;
- 15 the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;
- wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user and the second data from the data base, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the
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25 dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document, the sequence of requests being such that requests each request is the logical extension of information provided by the user in response to previous requests and each request that is not the logical extension of information provided by the user in response to previous requests is omitted.

2. The system of claim 1, further wherein the user interface and controller directly manipulates the document to prepare and generate the document.

3. The system of claim 1, wherein the word processing application includes a template containing text that is unaltered as well as at least one location in the template defining a location in the document for the insertion of text into the document by the word processing application.

4. The system of claim 1, wherein the data base provides said second data to the user interface and controller in response to commands from the user interface and controller, the user interface and controller inserting said second data into the document either directly or by instructing the word processing application.

5. The system of claim 1, further wherein the data base provides said second data to the word processing application in response to commands from the user interface and controller, the word processing application inserting said second data into the document.

6. The system of claim 1, further wherein the data base provides said second data directly into the document in response to commands from the user interface and controller.

7. The system of claim 1, wherein the sequence of requests is presented to the user by screen displays comprising a plurality of forms presenting the requests to the user.

8. The system of claim 7, wherein the first data provided by the data base to the user interface and controller for providing a format for the requests to the user comprises data used in determining the form of the plurality of forms displayed and the content of the form displayed to solicit information from the user to prepare the document.

9. The system of claim 7, wherein the forms are dynamically alterable in response to information provided in response to previous requests.

10. The system of claim 9, wherein the forms comprise a group of screen displays each having a specified format, the format of at least one form comprising at least one dynamically alterable request and an entry area for responding to the at least one request.

11. The system of claim 9, wherein the program executes at least one logical function.

12. The system of claim 11, wherein the program comprises a program logic and an insert text function that responds to the program logic to insert text into the document upon command when the program logic has received all information relating to a specified provision of the document.

13. The system of claim 12, wherein each of the program logic and insert text function execute at least one logical function.

14. The system of claim 12, wherein each of the program logic and insert text function and forms execute at least one logical function based on information obtained from the user in response to the forms.

15. The system of claim 11, wherein the program executes a plurality of logical functions or combinations of logical functions.

16. The system of claim 15, wherein the plurality of logical functions include the SELECT CASE function of Visual Basic.

17. The system of claim 12, wherein the insert text function modifies the document at all locations affected by the information relating to a specified issue in the document.

18. The system of claim 12, wherein the insert text function returns control to the program logic once text has been inserted into the document.

19. The system of claim 7, wherein the forms communicate with the data base to obtain information necessary for preparation of the document and the data base provides said first data to the forms necessary to prepare a respective form to solicit information from the user for the preparation of the document.

20. The system of claim 12, wherein the insert text function manipulates the document by providing instructions to the word processing application to manipulate the document.

21. The system of claim 12, wherein the insert text function directly manipulates the document.

22. The system of claim 17, wherein the program logic controls the data base to obtain the second data from the data base for displaying in a respective form at least one textual provision for insertion into the document.

23. The system of claim 1, wherein the document comprises a finance commitment letter.

24. The system of claim 1, wherein the user interface and controller comprises a programmed computer executing an application created using Visual Basic.

25. The system of claim 24, wherein the word processing application comprises Microsoft Word.

26. The system of claim 1, wherein the program includes at least one confirmation dialog to interface with the user to confirm at least one response to a previous request.

27. The system of claim 26, wherein after a user confirms that at least one response to the confirmation dialog is correct, the document is manipulated to alter

the document in response to the information that is the subject of the confirmation dialog.

28. The system of claim 3, wherein the user can manipulate the template to make changes to the template.

29. The system of claim 28, wherein the changes are optionally permanent.

30. The system of claim 1, wherein the program allows the user to generate at least one alternative provision for insertion into the document.

31. The system of claim 1, wherein the program includes text for insertion into the document.

32. The system of claim 30, wherein the user has the option to use the at least one alternative provision once or can save the alternative provision permanently for future use.

33. The system of claim 32, wherein a single use provision is inserted into the document and not saved.

34. The system of claim 33, wherein a saved provision for future use is added to the data base.

35. The system of claim 1, wherein the data base has stored therein alternative provisions for insertion in the document.

36. The system of claim 1, wherein alternative textual provisions in the data base for the document are accessible by the user for modifying the alternative textual provisions or adding a further alternative textual provision.

37. The system of claim 36, wherein the user can access directly the alternative textual provisions in the data base when not responding to the sequence of requests.

38. The system of claim 7, wherein the forms comprise at least one form having at least one entry location for inserting a monetary amount, and wherein the entry location is divided into a plurality of fields of increasing order, so that the user can insert a number into a selected field of highest selected order without inserting a number into lower order fields and wherein the lower order fields are automatically populated with a zero in the absence of user insertion of a number into such lower order fields.

39. The system of claim 7, wherein the forms comprise at least one form allowing a user to input a date, the form comprising at least one entry area for month, day and year.

40. The system of claim 1, wherein the data base comprises Microsoft Access.

41. The system of claim 1, wherein the system comprises a general purpose digital computer having included therein the user interface and controller, the word processing application and the data base, the user interface and controller, word processing application and and data base comprising software.

42. The system of claim 1, wherein the word processing application embeds in the document code to enable the user to continue modifying the document using only the word processing application.

43. The system of claim 1, wherein the program allows the user to make changes directly in the document while the sequence of requests is being presented to the user.

44. The system of claim 1, wherein the sequence of requests are dynamically alterable such that the user is not provided any redundant requests for information and any requests for information inconsistent with responses to previous requests.

45. The system of claim 1, wherein the system manipulates the document as requests are being presented to the user.

46. The system of claim 45, wherein the user interface and controller provides a simultaneous display to the user showing the requests to the user and at least a portion of the document as it is being prepared.

47. The system of claim 7, wherein the data base comprises a plurality of alternative provisions for the document, and wherein the program evaluates the alternative provisions in response to information provided by the user in response to the requests to determine which of the provisions to display in a form of the plurality of forms.

48. The system of claim 1, wherein the program determines and directs the word processing application as to where in the document textual provisions are to be inserted, locations for the insertion of the textual provisions in the document being dynamically added or changed by the program directing the word processing application.

49. The system of claim 10, wherein the document is dynamically altered in response to information provided by the user in response to the sequence of requests to modify the document to present the information provided by the user.

50. The system of claim 1, further wherein the program includes at least one mathematical calculation routine.

51. The system of claim 1, wherein the database optionally stores a table of responses to the requests to prepare a document, wherein the table of responses can be displayed to a user so that the user can change responses to selected ones of the requests, the program allowing the user to change selected responses whereby the document is redrafted based on the responses including the changed responses.

52. The system of claim 7, wherein the database stores, together with selected alternative provisions, commentary to assist the user in using such alternative provisions in the document and further wherein such commentary is displayed in a form of the plurality of forms associated with the alternative provisions.

53. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word

processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

5 a user interface and controller having a plurality of programming functionalities;

the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

10 the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller to provide information for presenting the requests to the user and providing data from the data base into the document;

15 the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

20 wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next question of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making all changes to the document necessitated by the information solicited by the sequence of requests;

the program inserting text into the document at all locations in the document affected by the information and wherein text is different in at least one location from the other locations.

54. The system of claim 53, wherein the sequence of requests are presented to the user by at least one screen display.

55. The system of claim 54, wherein the sequence of requests are presented by a plurality of screen displays, a subsequent one of the screen displays being dynamically alterable in response to information obtained in response to a previous screen display.

56. The system of claim 53, wherein the sequence of requests are dynamically alterable so that responses to prior requests can change subsequent requests.

57. The system of claim 54, wherein a response to at least one of the sequence of requests does not result in alteration of the document until a response is provided to at least one subsequent request.

58. The system of claim 55, wherein the program dynamically alters a screen display in response to information obtained in response to a request and the document is altered to reflect the information obtained.

59. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

5 a user interface and controller having a plurality of programming functionalities;

the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

10 the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller, the data being provided to the user interface and controller to provide information for presenting the requests to the user and inserting data into the document;

15 the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

20 wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making at least one change to the document necessitated by the information solicited by the sequence of requests, further wherein the program provides a confirmation dialog to the user to allow the user to confirm the responses given to selected ones of the sequence of requests prior to making the at least one change in the document, and wherein, if the user indicates that information
30 previously provided in response to the selected requests is incorrect, the program will return the user to a portion of the program to resolicit information that is the subject of the confirmation dialog.

60. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

5 a user interface and controller having a plurality of programming functionalities;

the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

10 the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller, the data being provided to the user interface and controller for providing information for presenting the requests to the user and insert data into the document;

15 the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

20 wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making at least one change to the document necessitated by the information solicited by the sequence of requests and further wherein the word processing application has a template for the document containing document

provisions, the template being modifiable in response to user input by the word processing application to add provisions for inclusion in the template.

61. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

a user interface and controller having a plurality of programming functionalities;

the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller, the data being provided to the user interface and controller for providing information for presenting the requests to the user and inserting data into the document;

the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making at least one change to the document necessitated by the
information solicited by the sequence of requests and further wherein the data base
stores a textual provision for the document, the program enabling the user to add at
least one alternative textual provision to the document and giving the user, while
30 responding to the sequence of requests, the option to add the alternative textual
provision as a permanent addition to the data base.

62. A system for automated drafting of a customized document, the
system interfacing with a word processing application having a plurality of word
processing functionalities and with a database having a plurality of data base
functionalities, the system comprising:

5 a user interface and controller having a plurality of programming
functionalities;

the user interface and controller interfacing with a user by presenting a
sequence of requests to the user so that the user provides information necessary to
prepare the document;

10 the user interface and controller communicating with the data base whereby
the data base supplies data stored in the data base to the user interface and controller,
the data being provided to the user interface and controller for providing information
for presenting the requests to the user and inserting data into the document;

15 the user interface and controller and the word processing application
communicating so that the user interface and controller controls the word processing
application to prepare and generate the document;

20 wherein the user interface and controller comprises a program for providing
the sequence of requests to the user to obtain the information from the user for the
preparation of the document and further for manipulating the document using the
word processing application in response to the information received from the user,

and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making at least one change to the document necessitated by the information solicited by the sequence of requests, and further wherein the data base contains at least one textual provision for insertion into the document, the program allowing the user to modify the textual provision and giving the user, while responding to the sequence of requests, the option to replace, in the data base, the
30 textual provision with the modified textual provision.

63. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

5 a user interface and controller having a plurality of programming functionalities;

 the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

10 the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller, the data being provided to the user interface and controller for providing information for presenting the requests to the user and inserting data into the document;

 the user interface and controller and the word processing application
15 communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

the sequence of requests being presented by a form displayed on a display device;

the program making at least one change to the document necessitated by the information solicited by the sequence of requests and further comprising a user control in the program for displaying a form having at least one entry location for inserting a number;

and wherein the entry location is divided into a plurality of fields of increasing order, so that the user can insert a number into a selected field of highest selected order without inserting a number into lower order fields and wherein the lower order fields are automatically populated with a zero in the absence of user insertion of a number into such lower order fields.

64. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

a user interface and controller having a plurality of programming functionalities;

the user interface and controller interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

10 the user interface and controller communicating with the data base whereby the data base supplies data stored in the data base to the user interface and controller, the data being provided to the user interface and controller for providing information for presenting the requests to the user and inserting data into the document;

15 the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

20 wherein the user interface and controller comprises a program for providing the sequence of requests to the user to obtain the information from the user for the preparation of the document and further for manipulating the document using the word processing application in response to the information received from the user, and further wherein the sequence of requests is dynamically altered by the program in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

25 the program making at least one change to the document necessitated by the information solicited by the sequence of requests and further comprising a user control allowing a user to input a date, the user control comprising a screen display on a display device having at least one entry area for month, day and year.

65. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

using a programming environment program to control a word processing application;

further comprising providing first and second data from a data base to the program;

5 using the first data to format the sequence of requests to the user and using the second data to prepare text in the document;

controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user and the second data from the data base;

10 further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document; further wherein;

15 the sequence of requests being such that each request is the logical extension of information provided by the user in response to previous requests and each request that is not the logical extension of information provided by the user in response to previous requests is omitted.

66. The method of claim 65, further comprising using the program to directly manipulate the document to prepare and generate the document.

67. The method of claim 65, wherein the document comprises a template in the word processing application containing text that is unaltered as well as at least one location in the template for the insertion of text into the document by the word processing application.

68. The method of claim 65, further comprising causing the data base to provide said second data to the program in response to commands from the program, and inserting said second data into the document either directly using the program or by manipulating the word processing application.

69. The method of claim 65, further comprising causing the data base to provide data to the word processing application in response to commands from the program, and inserting said data into the document using the word processing application.

70. The method of claim 65, further comprising causing the data base to provide said second data directly into the document in response to commands from the program.

71. The method of claim 65, further comprising providing the sequence of requests to the user by screen displays comprising a plurality of forms presenting the questions to the user.

72. The method of claim 71, further comprising using the first data to determine the form displayed and the content of the form displayed to solicit information from the user to prepare the document.

73. The method of claim 71, further comprising dynamically altering the forms in response to information provided in response to previous requests.

74. The method of claim 71, further comprising providing the sequence of requests comprising forms by providing a plurality of screen displays each having

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a specified format, the format of at least one form comprising at least one dynamically alterable request and an entry area for responding to the at least one request.

75. The method of claim 65, further comprising inserting text into the document when all information relating to a specified provision of the document has been received.

76. The method of claim 75, further comprising modifying the document at all locations affected by the information relating to a specified issue in the document.

77. The method of claim 65, further comprising executing at least one logical function or a combination of logical functions in said program.

78. The method of claim 65, further comprising providing at least one confirmation dialog to interface with the user to confirm that at least one response to a previous request.

79. The method of claim 78, further comprising manipulating the document to alter the document in response to the information that is the subject of the confirmation dialog after a user confirms that the responses to the confirmation dialog are correct.

80. The method of claim 67, further comprising manipulating the template to make changes to the template.

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81. The method of claim 80, wherein the changes are optionally permanent.

82. The method of claim 65, further comprising providing at least one alternative provision for insertion into the document.

83. The method of claim 82, further comprising providing the user the option to use the at least one alternative provision once or to save the alternative provision permanently for future use.

84. The method of claim 83, further comprising saving the alternative provision permanently in the data base.

85. The method of claim 65, further comprising storing at least one alternative provision for the document in the data base.

86. The method of claim 65, further comprising allowing a user to access alternative textual provisions of the document in the data base for modification of the alternative textual provisions or adding a further alternative textual provision.

87. The method of claim 86, further comprising modifying the textual provisions once or saving same in the data base for future use.

88. The method of claim 65, further comprising providing text from the program into the document.

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89. The method of claim 86, further comprising allowing the user to access directly the alternative textual provisions in the data base when not responding to the sequence of requests.

90. The method of claim 65, further comprising providing on the display device at least one entry form having at least one entry location for inserting a number, and wherein the location is divided into a plurality of fields of increasing order, so that the user can insert a number into a selected field of highest selected order without inserting a number into lower order fields and wherein the lower order fields are automatically populated with a zero in the absence of user insertion of a number into such lower order fields.

91. The method of claim 65, further comprising providing on the display device at least one entry form allowing a user to input a date, the form comprising at least one entry area for month, day and year.

92. The method of claim 65, further comprising embedding code in the document to enable the user to continue modifying the document using only the word processing application.

93. The method of claim 65, further comprising allowing the user to make changes directly in the document while the sequence of requests is being presented to the user.

94. The method of claim 65, further comprising dynamically altering the sequence of requests so that redundant requests and requests that are inconsistent with responses to previous requests are not presented.

95. The method of claim 65, further comprising manipulating the document as requests are being presented to the user.

96. The method of claim 95, further comprising providing a display on the display device to the user showing the requests to the user and at least a portion of the document as it is being prepared.

97. The method of claim 71, further comprising storing in the data a plurality of alternative provisions for the document, and wherein the program evaluates the alternative provisions in response to information provided by the user in response to the requests to determine which of the provisions to display in a form of the plurality of forms.

98. The method of claim 65, further comprising determining and directing the word processing application as to where in the document textual provisions are to be inserted, and dynamically altering or changing locations for the insertion of the textual provisions in the document by directing the word processing application using the program.

99. The method of claim 65, further comprising dynamically altering the document in response to information provided by the user in response to the sequence of requests to modify the document to present the information provided by the user.

100. The method of claim 65, further comprising executing at least one mathematical calculation in the program.

101. The method of claim 65, further comprising optionally storing in a table of responses to the requests to prepare the document, displaying the table of responses to the user so that the user can change responses to selected ones of the requests, and allowing the user to change selected responses whereby the document is redrafted based on the responses including the changed responses.

102. The method of claim 65, further comprising storing in the database together with selected alternative provisions, commentary to assist the user in using such alternative provisions in the document and further comprising displaying such commentary in a form of the plurality of forms associated with the alternative provisions.

103. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

using a programming environment program to control a word processing application;

further comprising providing data from a data base to the program;

using the data to format the sequence of requests to the user and to prepare the document;

controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user;

further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining

the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document; further comprising;

making all changes to the document necessitated by the information solicited by the sequence of requests, the program inserting text into the document at all locations in the document affected by the information and wherein the text is different in at least one location from the other locations.

104. The method of claim 103, further comprising presenting the sequence of requests to the user by at least one screen display.

105. The method of claim 104, further comprising presenting the sequence of requests by a plurality of screen displays, and dynamically altering at least one subsequent one of the screen displays in response to information obtained in response to a previous screen display.

106. The method of claim 103, further comprising dynamically altering the sequence of requests so that responses to prior requests can change subsequent requests.

107. The method of claim 103, further comprising not altering the document in response to a request until a response is provided to at least one subsequent request.

108. The method of claim 105, further comprising dynamically altering a screen display in response to information obtained in response to a request and altering the document to reflect the information obtained.

109. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

5 using a programming environment program to control a word processing application;

further comprising providing data from a data base to the program;

using the data to format the sequence of requests to the user and to prepare the document;

10 controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user;

further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

15 making at least one change to the document necessitated by the information solicited by the sequence of requests; and further comprising providing a confirmation dialog to the user to allow the user to confirm the responses given to selected ones of the sequence of requests prior to making the at least one change in the document and wherein, if the user indicates that information previously provided in response to the selected ones of the requests is incorrect, the program will return the user to a portion of the program to resolicit information that is the subject of the confirmation dialog.

110. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

using a programming environment program to control a word processing application;

5 further comprising providing data from a data base to the program;

using the data to format the sequence of requests to the user and to prepare the document;

controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user;

further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

15 making at least one change to the document necessitated by the information solicited by the sequence of requests and further comprising providing a word processing template for the document containing document provisions, and modifying the template in response to user input using the word processing application to add provisions for inclusion in the template.

111. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

5 using a programming environment program to control a word processing application;

further comprising providing data from a data base to the program;

using the data to format the sequence of requests to the user and to prepare the document;

10 controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user;

15 further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

making at least one change to the document necessitated by the information solicited by the sequence of requests, and further comprising:

storing a textual provision for the document in the data base;

20 enabling the user to add at least one alternative textual provision to the document; and

giving the user, while responding to the sequence of requests, the option to add the alternative textual provision as a permanent addition to the data base.

112. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

5 using a programming environment program to control a word processing application;

further comprising providing data from a data base to the program;

using the data to format the sequence of requests to the user and to prepare the document;

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10 controlling the word processing application using the programming
environment program to prepare and generate the document in response to the
information provided by the user;

 further wherein the sequence of requests is dynamically altered in response to
the information provided in response to previous requests, the program determining
15 the next request of the dynamically alterable sequence of requests to be provided to
the user and when and how to manipulate the document;

 making at least one change to the document necessitated by the information
solicited by the sequence of requests, and wherein the data base contains at least one
textual provision for insertion into the document, and allowing the user to modify the
20 textual provision and giving the user, while responding to the sequence of requests,
the option to replace, in the data base, the textual provision with the modified textual
provision.

113. A method for automated drafting of a customized document
comprising:

 presenting a sequence of requests to a user on a computer display device so
that the user provides information necessary to prepare the document;

5 using a programming environment program to control a word processing
application;

 further comprising providing data from a data base to the program;

 using the data to format the sequence of requests to the user and to prepare
the document;

10 controlling the word processing application using the programming
environment program to prepare and generate the document in response to the
information provided by the user;

15 further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

making at least one change to the document necessitated by the information solicited by the sequence of requests, and further comprising providing a user control for displaying a form having at least one entry location for inserting a number;

20 and further wherein the entry location is divided into a plurality of fields of increasing order, so that the user can insert a number into a selected field of highest selected order without inserting a number into lower order fields and wherein the lower order fields are automatically populated with a zero in the absence of user insertion of a number into such lower order fields.

114. A method for automated drafting of a customized document comprising:

presenting a sequence of requests to a user on a computer display device so that the user provides information necessary to prepare the document;

5 using a programming environment program to control a word processing application;

further comprising providing data from a data base to the program; using the data to format the sequence of requests to the user and to prepare the document;

10 controlling the word processing application using the programming environment program to prepare and generate the document in response to the information provided by the user;

further wherein the sequence of requests is dynamically altered in response to the information provided in response to previous requests, the program determining

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15 the next request of the dynamically alterable sequence of requests to be provided to the user and when and how to manipulate the document;

making at least one change to the document necessitated by the information solicited by the sequence of requests, and further comprising providing a user control to input a date, the user control comprising a screen display on a display device
20 having at least one entry area for month, day and year.

115. A system for automated drafting of a customized document, the system interfacing with a word processing application having a plurality of word processing functionalities and with a database having a plurality of data base functionalities, the system comprising:

25 a user interface and controller having a plurality of programming functionalities;

the user interface and controller comprising means for interfacing with a user by presenting a sequence of requests to the user so that the user provides information necessary to prepare the document;

30 the user interface and controller further comprising means for communicating with the data base whereby the data base supplies first and second data stored in the data base to the user interface and controller, the first data being provided to the user interface and controller for providing a format for the requests to the user and the second data being provided to the user interface and controller for preparing text in
35 the document;

the user interface and controller and the word processing application communicating so that the user interface and controller controls the word processing application to prepare and generate the document;

40 wherein the user interface and controller comprises means for providing the sequence of requests to the user to obtain the information from the user for the

preparation of the document and further for manipulating the document using the
word processing application in response to the information received from the user
and the second data from the data base, and further comprising means for
dynamically altering the sequence of requests in response to the information
45 provided in response to previous requests, and for determining the next request of the
dynamically alterable sequence of requests to be provided to the user and when and
how to manipulate the document, the sequence of requests being such that each
request is the logical extension of information provided by the user in response to
previous requests and each request that is not the logical extension of information
50 provided by the user in response to previous requests is omitted..

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